



Atlantic Conversations II

A Report on Social Media in Atlantic Canada
2010

Table of Contents

1. Introduction
2. Approach
3. Methodology
4. Understanding Social Web & Commerce Web
5. Internet Use in Atlantic Canada
6. Findings
7. Predictions & Forecast - 2010

Reproduction Rights & Findings Notice

The material herein is copyright MediaBadger Public Affairs. Material may be reproduced with recognition of the author in part or in whole. Some information may be copyright to third parties such as statistical data where noted. In such instances recognition of the author should be provided.

The information and statistics reported herein are considered accurate as indicated at the time of reporting. MediaBadger is not responsible for any changes or alterations that may have occurred during or after the compilation of this report.

Introduction

Overview

In early 2008 we began monitoring social media use in Atlantic Canada using our proprietary mediasphere360 software. We wanted to understand how social media was being used, by whom and what was happening.

In January of 2009, we released the first public report containing highlighted information. As our product improved and we were able to obtain more data and look back historically, we're doing the same this year; with additional data. As before, the more detailed report is available to clients and for a purchase price of \$499/copy in PDF format.

Sharing Our Report

Social Media has become so popular because of the tools, technologies and services that make up what is known as "Social Media" or the "Social Web." Social Media is all about sharing and community. So we decided to share most of what we've come to learn about how Atlantic Canadians are using the Social Web and why. So that businesses, governments and academics will have a common ground for developing strategies programs and opportunities for engagement with key audiences.

We have shared what we believe are the key elements of Social Media usage and behaviour here in our region. Not all data from our research is available here. We have a comprehensive premium report available for purchase or for our clients.



2. Approach

Our approach to this research was to set a defined period of time in which we would analyse a set of parameters using our own social and traditional media monitoring tool, mediasphere360, to monitor Social Media channels. In addition we incorporated publicly available statistical data from recognized resources (credit provided where quoted.)

Additionally, we have continued to monitor traditional media sources with an online presence. Our objective was to understand who is using these tools, how and why.

3. Methodology

Primary monitoring was completed using our proprietary mediasphere360 monitoring tool. This Web-based software uses a complex system of proprietary search algorithms with an integrated layer of Artificial Intelligence to help analyze and sort the vast amounts of information flowing into our servers. We defined a set of parameters to help us build a comprehensive listed of blogs, microblogs, photo and video sharing accounts and publicly available Social Network information. Information was then vetted by an analyst and a customized RSS reader used to provide inputs. Selected blogs, microblogs, photo and video accounts could then be monitored for usage rates and content volume. In addition, comment fields were analyzed on major industrial media sites (i.e. newspapers) in selected cities around the region.

We also applied the use of several other monitoring services as additional validation of the results and information. Publicly available statistics on Internet usage from reputable sources such as Statistics Canada and Ipsos-Reid were used as the benchmark point of online demographics within the region. A specific challenge arose with monitoring certain newspaper sources in the region who delete public comments and the originating article after several days, thus eliminating a valuable resource tool for Social Anthropologists, sociologists, behaviorists, public relations practitioners and market researchers in both academic and commercial settings.

The resulting data was then analyzed over a period of weeks and compiled into this Executive Summary Report and a Premium Report for clients.

About MediaBadger

Formed in 2007 the firm is a growing Social Intelligence and Strategy agency providing insight and research into Social Media and digital media as a whole to PR and IR agencies, ad and marketing agencies and directly to clients in business, government and non-profit. MediaBadger has provided key insights to aid in planning better advertising strategies and online marketing activities, cues for creative directors and aiding both public and investor relations firms to develop communications plans.

In 2009 the company saw significant growth in the area of Digital Crisis Management for businesses, government and non-profits in Canada and the United States. Today, MediaBadger has clients small and large across North America and the United Kingdom. The company continues to develop it's core product, mediasphere360, which will release as a SaaS version in mid-2010.

Some of Our Clients



4. The Social Web & The Commerce Web

Presence Engineering

We divide the Web into two components; the Social Web and the Commerce Web. These distinctions are helpful in understanding where to place efforts in regards to marketing, communications and engagement strategies.

Commerce Web

These are standard websites created by a private or public organization to present product(s), service(s) or a message. Essentially they are one-way in nature (like a brochure) and serve to have the visitor engage in a particular activity such as making a purchase. The organization controls the message and how it is presented, members of the public cannot edit or alter the information.

Essentially this is Web 1.0 since there is no two-way communications. The traditional website is not diminished in value in any way and remains a vital component to an organizations overall Web presence and strategy.

Social Web

This is where a company or organization actually engages in two-way communications with the public or a selected target audience. This is where an organizations “presence” is extended through distributing content (audio, image, video, text) that may be shared, tagged, altered and discussed. In the Social Web, the organization loses control of the message, at best being able to manage it. This is the point of hesitation, understandably so, for organizations.

The Social Web is “social media” and it is the fastest growing component of the Internet as a whole.

Social Intelligence

To us, this means providing business, government and organizations with key information regarding social media use for marketing, public and investor relations and general engagement. Such insights can help guide creative direction, advertising strategies, public relations campaigns, identify potential crises and more.

5. Internet Use in Atlantic Canada

Almost all Social Media services leverage the Internet/Web in one form or another. Even most SMS services from mobile phones often use Web-based sign-ups or services management. Thus it is important to understand general Internet use in Atlantic Canada.

According to Statistics Canada, 73% of Canadians on average, access the Internet regularly (as in daily.) In Canada, British Columbia, Alberta and Ontario lead the pack above the national average with Nova Scotia being in fourth place followed by New Brunswick. PEI and Newfoundland trail below Saskatchewan. Our view of higher Internet use in Canada is due to population migration to those areas since the 2005 survey as prior to that Nova Scotia and New Brunswick lead internet use - then Maritimers moved west for jobs.

As expected, Internet use is highest in urban areas across Canada and the preference of Canadians is for high-speed access. This carries through to Atlantic Canada and so it makes sense that the highest use of Social Media services is in urban areas in this region.

Starting with New Brunswick in 2005 and through to 2007 all Atlantic Province governments recognized that bringing broadband access to rural communities was vital. These programs are rolling out with Nova Scotia and New Brunswick being the most aggressive. Newfoundland Labrador has commenced this program but will face challenges similar to Vermont in the United States - mountainous terrain and challenges with delivering infrastructure to remote communities.

How The Internet is Impacting Media Consumption

According to the Statistics Canada survey in 2007, which included the 16-20 age group previously ignored, nearly one-fifth of Canadians or 20% of the population had used what can be classified as Social Media services - blogging, chatting and sharing of digitalized information. We suspect this to actually be higher and our research has shown a 14% increase in Social Media participation in 2008 in Atlantic Canada as we measured activity on blogs, commentary on traditional newspaper sites and microblogging activity.

67% of Canadians, when watching television, are also using the Internet. Approximately 49% of Canadians have wireless Internet access in the home and over 30% of Canadians have more than 2 computers in the home. Additionally, over 80% of Atlantic Canadians have mobile phones and adoption of smart phones is increasing rapidly. As data rates go down, we expect to see increased use of mobile Social Media applications.

The majority of the population in Atlantic Canada live in urban areas, and they are consuming media much the same way as all parts of Canada - through multiple channels. It is possible today to gain as much insight to local events and news without ever turning on a radio or television or buying a newspaper. More importantly, Atlantic Canadians seem to be enjoying the ability to interact by commenting on news stories on a traditional newspaper's website or on a blog. Atlantic Canadians are consuming media very differently today than five years ago, presenting opportunity and challenges to businesses looking to reach their target audiences in an increasingly fragmented media space.

6

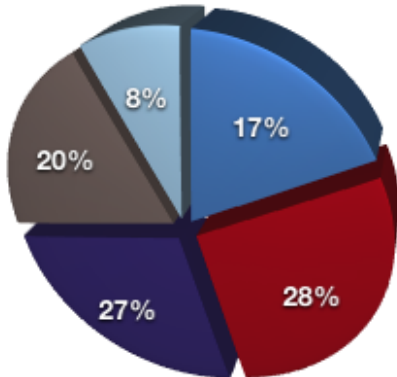
The Findings 2010

Looking at Social Media Usage Patterns in Atlantic Canada

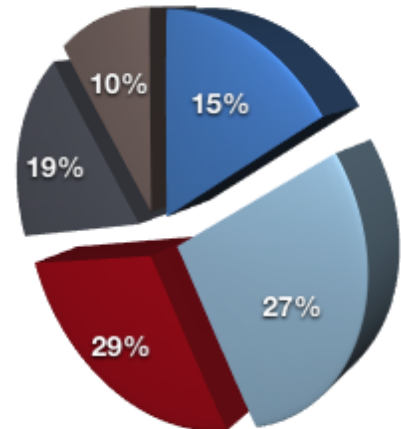
2008-2009

Demographic Data

NB Age Groups



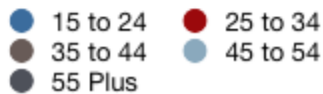
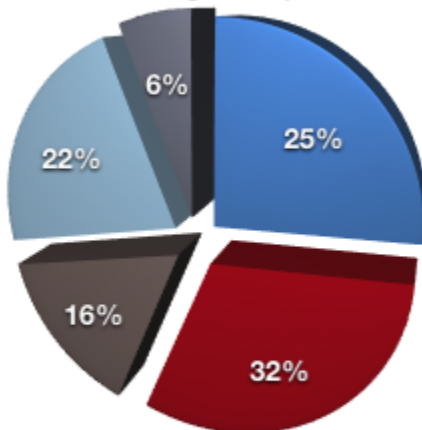
NS Age Groups



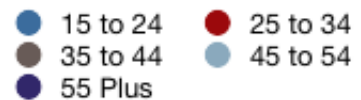
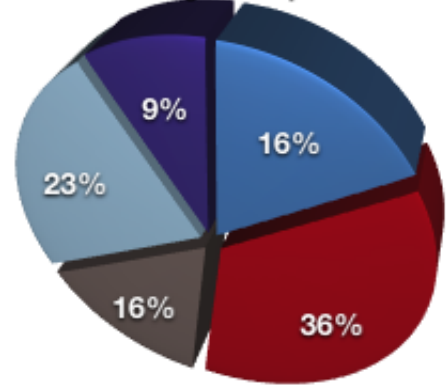
The most significant growth area for age groups this year continued to be the 30-55 demographic.

The illusion that it's just "kids" engaging in Social Media usage should be clearly dispelled. Usage patterns however, differ. Under 30 spends more time in Social Networks and women spent an average of 24% more time in Social Media channels; mostly networking sites.

NFLD Age Groups

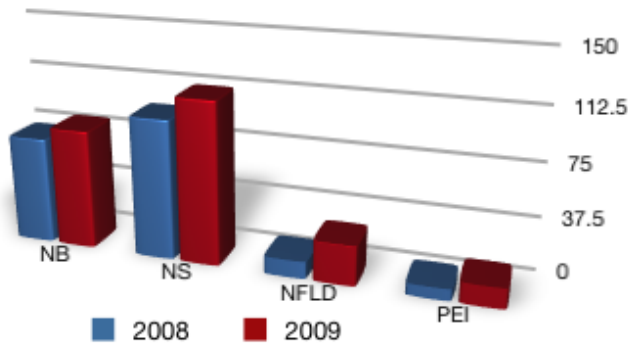


PEI Age Groups



The Blogosphere

Business Blogs in Atlantic Canada

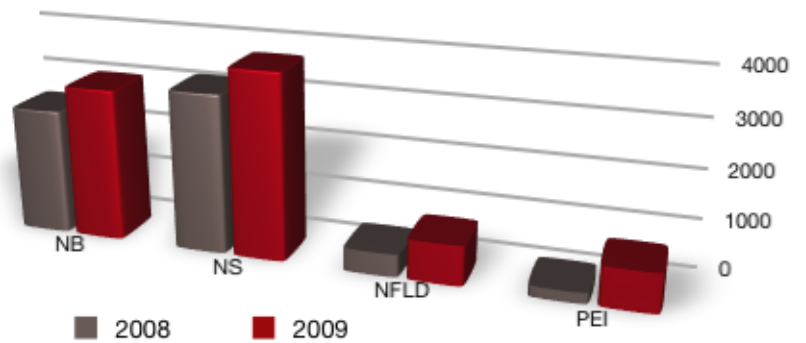


Businesses continue to lag behind in blog usage in Atlantic Canada. Nova Scotia saw the most significant growth followed by New Brunswick. We did note that NB businesses tend to blog more often than NS businesses however; 30% more often.

Newfoundland did see significant growth comparatively however; most notably in the tourism sector, similar to PEI.

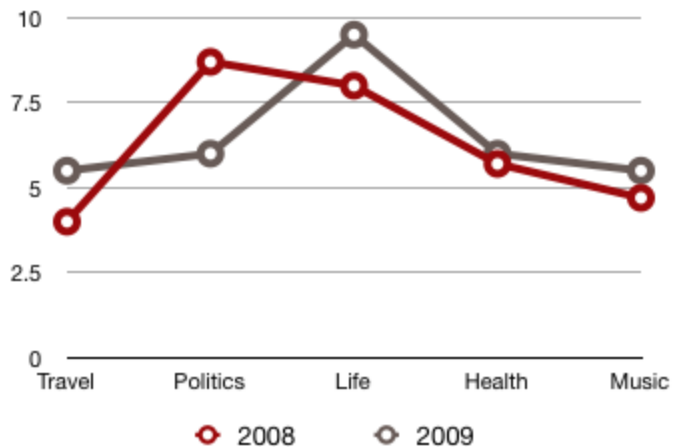
Citizens around the region found their blogging voice. We found the average age for blogging however to be 38 and female. Nova Scotia continues to lead the way with total number of blogs, but New Brunswick also leads with frequency of blogging similar to the business side. Both Newfoundland and PEI saw an increase with new blogs, PEI leading the way overall.

Citizen Blogs in Atlantic Canada



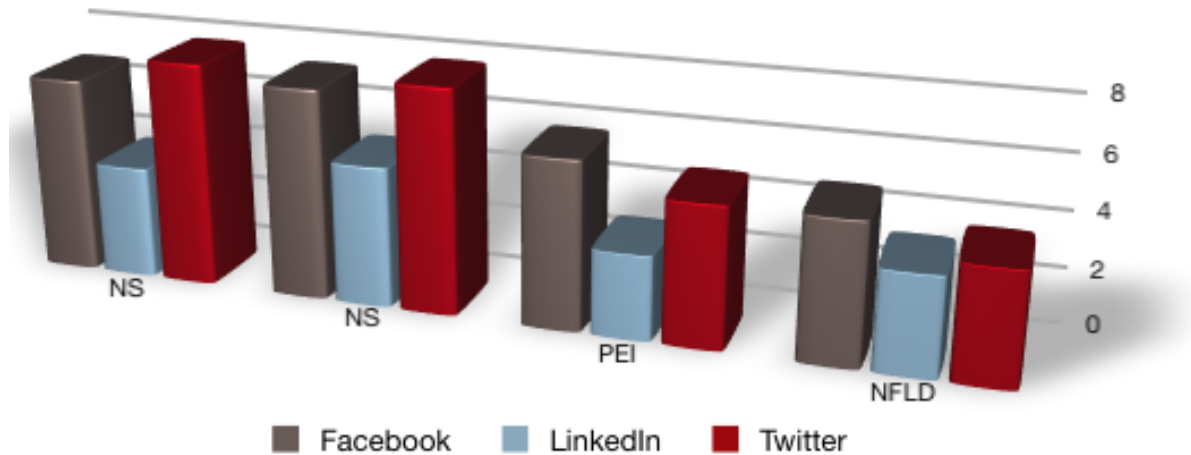
We saw the most significant topical increase in politics, most notably in NS and likely due to the election in June 2009. Travel followed with PEI, NFLD and NB leading the way on citizens blogging on travel-related issues for their own native province. Health blogging stayed fairly consistent with a slight increase in Music. The topic of "life" is a catch-all for blogging about ones life in general.

Top Blogging Topics



Social Mobile

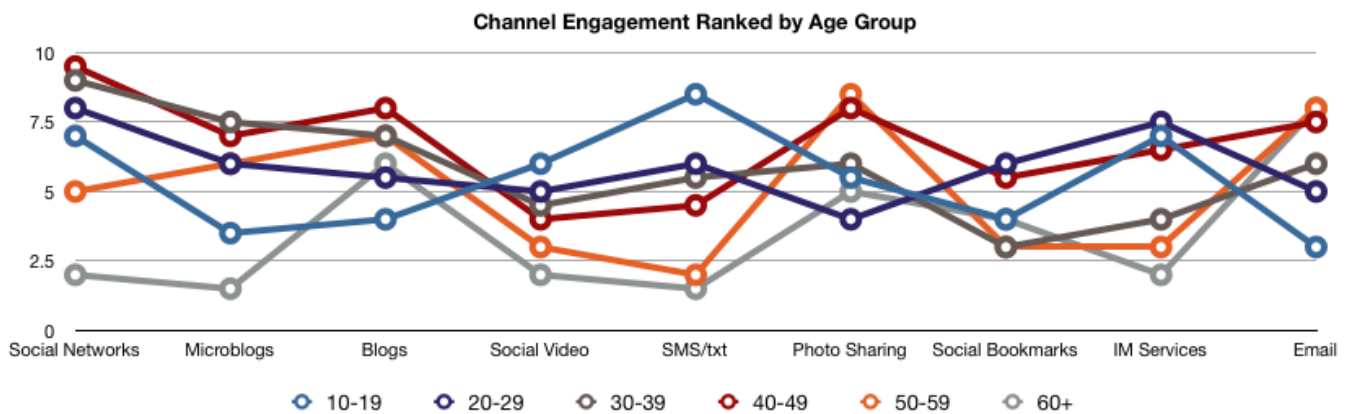
Preferred Mobile Social Networking Services | Atlantic Canada



We added mobile Social Media usage this year as we noted an increased use of smart mobile devices. Twitter was the tool of choice for mobile users, followed by Facebook and then LinkedIn. LinkedIn use saw most growth in the last 2 quarters of 2009 with an iPhone and Blackberry app becoming available.

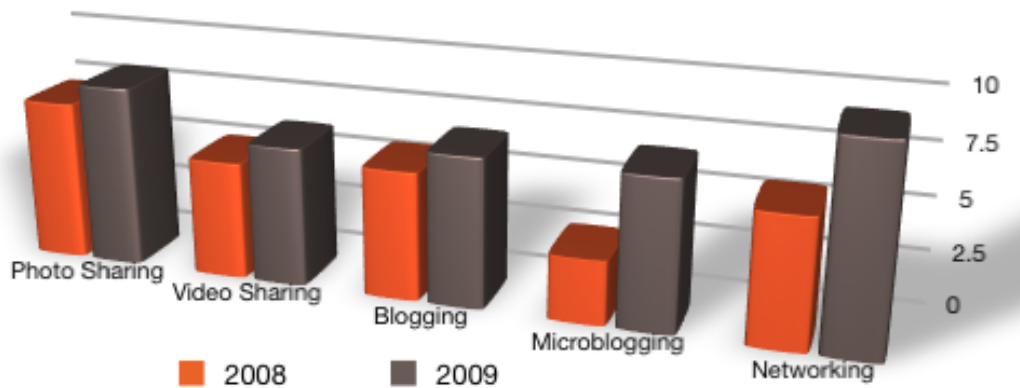
We note that average age of for using mobile tools is lower with all services; Facebook at 44, LinkedIn at 36 and Twitter at 32 respectively.

Channel Engagement



Different age groups are using different channels. The under 30 segment is most active with video creation and sharing, while the over 30 group seems to prefer photos. We also note a significant decline in email use under 40.

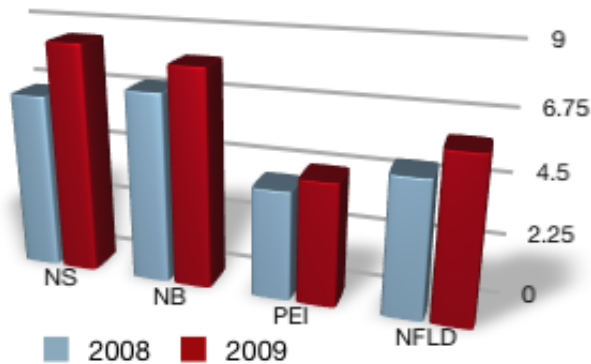
Top Activities by Rank | Atlantic Canada



Use of microblog tools like Twitter saw the highest growth followed by Social Networking services like Facebook. Blogging became slightly more popular. All of which shows that Social Media use is increasing across all of Atlantic Canada. There is no decrease with use of any service by citizens.

Most Active

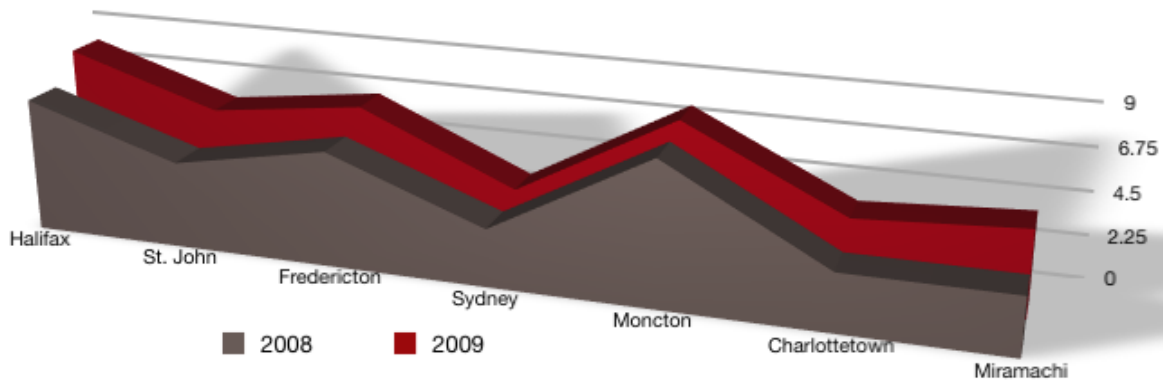
Most Active Province by Rank



Nova Scotia saw the most significant overall increase in Social Media usage overall at 32% over 2008. Newfoundland began to catch up but PEI had the slowest growth. We believe increased broadband access to rural areas helped spur increases in NS and NB.

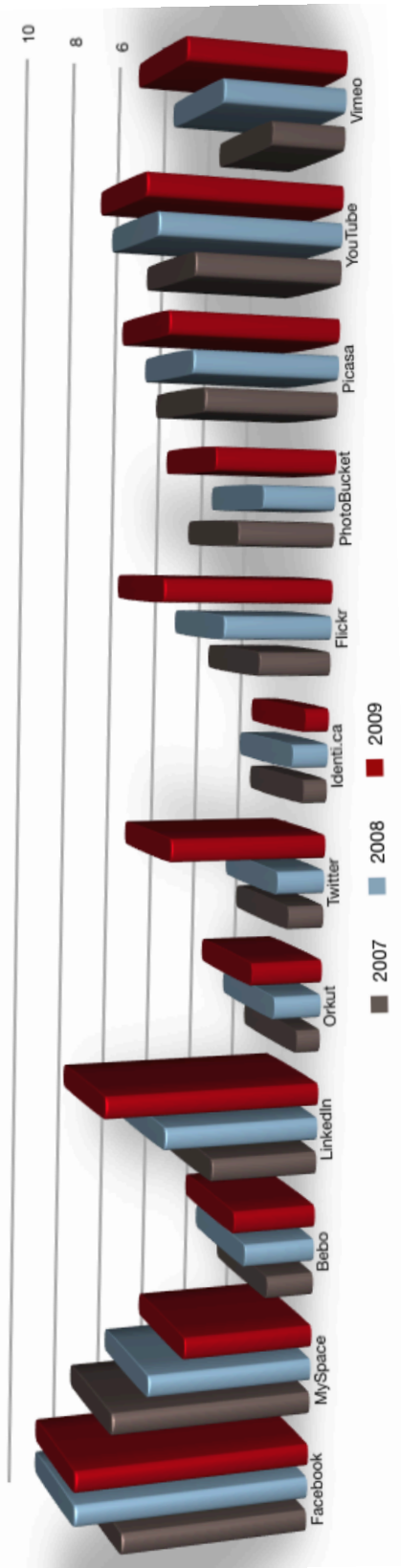
We noted through the year that as rural areas became lit up, Social Media tools were the first to be actively used.

Most Active Cities for Social Media | Atlantic Canada



Moncton clearly leads the way followed by Halifax and then Fredericton. Both NB cities are very “wired” with broadband and WiFi access. While they remained most active in comparison to last year there was little overall growth in activity. The biggest city for growth in usage was Miramichi in New Brunswick.

Top Social Media Tools by Rank



Facebook, LinkedIn and Twitter lead the way with tools used in 2009. Flickr lead the way as the most popular photo sharing site.

We note that in the 35+ category use of newsgroups and forums is quite high, but we did not include them as channels for this report.

Predictions & Forecast 2010

We predicted that people in Atlantic Canada would find their voice in 2009. They did. Usage of Social Media tools across all channels and age groups increased. In all major cities of the region, traditional news outlets jumped into Twitter and started to push more of their content online - and citizens responded. We saw an overall increase of 82% in each major news outlet's use of the comment capability on their websites over 2008. We said that mobile smart phone usage would also increase - and it did. We did not do well on our overall prediction of social media growth at 12% when it ended up as 34%.

Predictions

In 2010 we predict that the 40+ market will begin to engage with online business networking tools such as LinkedIn and that we'll see increased sales activities through these channels. Where we saw a 14% increase of social media channel use in 2008, in 2009 we saw a 34% overall increase in use across the board. We forecast approximately 30% increase in 2010 and that will in large part come from rural areas gaining broadband access. We also predict an ongoing increase in the Digital Divide between those who can afford computers and connections and those who can't.

Businesses have started to engage with Social Media tools, but growth in this area will continue to be small compared to citizen usage. On the citizen side, we think that citizens will begin to "organize" groups for both recreational purposes (i.e. sports teams) and societal purposes (i.e. political protest, community activism.) Print publications will continue to suffer and increasingly find their move to the Web a challenge. We also think that citizens will demand more privacy options and form into more "closed loop networks" defined by special interests (i.e. biking, arts.)

Forecast

We forecast overall growth of social media services use to be 42% CAGR over 2009. For businesses using social media we forecast a 18% overall increase in use with blogging and microblogging leading the service of choice. Businesses that target the under 25 bracket with Twitter will fail but see success in Facebook.

As we forecast last year, we continue this year to say that traditional print sources will continue to see a slide in print advertising revenues - most specifically in the small business sector who will invest in more cost effective online mediums. We also see an increased use of 16% or higher in mobile devices for txt messaging and social networking services. Marketers would do well to look towards mobile channels for marketing opportunities in 2010 and beyond.

Contact Information

To contact us for more information, a premium copy of this report or specific data, please email or phone us. Pricing is reasonable.

Phone: 902.448.0488

Email: giles@mediabadger.com

Web: mediabadger.com

Sun Tower
1550 Bedford Highway
Suite 204
Bedford, Nova Scotia
Canada
B4A 1E6

Some of our services include;

Monitoring & Analysis
Social Media Strategy for Marketing and Communications
Social Media Training
Workplace Policy Consulting
Social Media Crisis Management
Market Analysis
Online Reputation Management
Social Media Content Seeding

